



Instruction Past Member Module

1) Login access for Past Members

On automatic Circle Exit, Past Members will receive an email with a call-to-action -- make a choice what should happen to their account.

There will be 2 reminders (after 11months and after 11months + 3weeks) before their profile is archived automatically.

Depending on the association also having the "Active Past Members" module, they will get a slightly different message.

Dear **Regular**,

Your membership at **LADIES' CIRCLE** ends today. We would like to thank you for your friendship, your time and your dedication in supporting us.

You can choose to either upgrade your account to "**Active Past Member**" with access to all content of **CIRCLER.WORLD** or to **keep** your account and share your data with active members (opt-in), or to **archive** your account and delete your personal data.

Make a choice

Your account will be automatically archived after 12 months of inactivity.

This email can be resent from the Past Member's Record:

Admin / CRM / Record / Regular PastMember

Profile

ActivitiesCommunicationFinancialDocumentsNotesHistoryPermissions

SENT EMAILS

Search:

Show 10 results

Date	Subject	Email address(es)	Status	Actions
12/07/2020 12:21	Forgot password	glenn@glenn.be	(12/07/2020 12:21)	
			(12/07/2020 12:21)	

1 to 1 from 1 results

LEGEND

Sent?

Scheduled

Sent

Sending failed

Read?

Yes

No

ACTIONS

Resend 'Past Members' choice email

Send



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When they click the button **OR** log-in for the first time, they will see the following page and are required to make a choice to:

- keep their account,
- upgrade to Active Past Member (if the module is active)
- or archive their account

i Your membership at **LADIES' CIRCLE** has ended. Please choose what should happen with your **CIRCLER.WORLD** account below.

Make a choice:


☒ **Keep** my account (free)

You can still login to update your profile. After 12 months of inactivity your account will be automatically archived.

☐ **Upgrade** my account to an "Active Past Member" subscription, which gives me access to all **RT Demo** content.


This is a yearly renewable **CW** subscription that gives you access to all the content of your club, area and association.

☐ **Archive** my account and delete my personal data (if module is active)


 **Save**

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Past Members that keep/upgrade their account will eventually be redirected to their profile.

 My profile

Regular PastMember



Member Info

Preferences

Receive printed magazine?: No

Test

Buffalo Club: No

Personal information

Name: Regular PastMember

Username: RegularPastMember

Gender: Male

Contact details

Primary: glenn@glenn.be

Groups & functions

Global functions	Period
RTI • RT Demo • Distrikt 1 • RT3 Club C • Past Members	01/01/2020 - now

Work

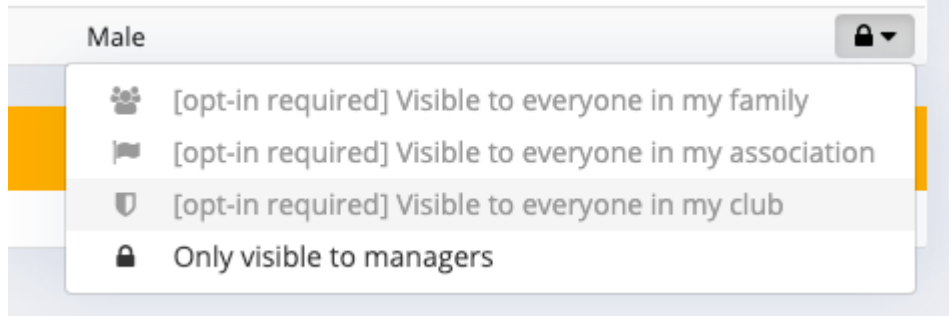
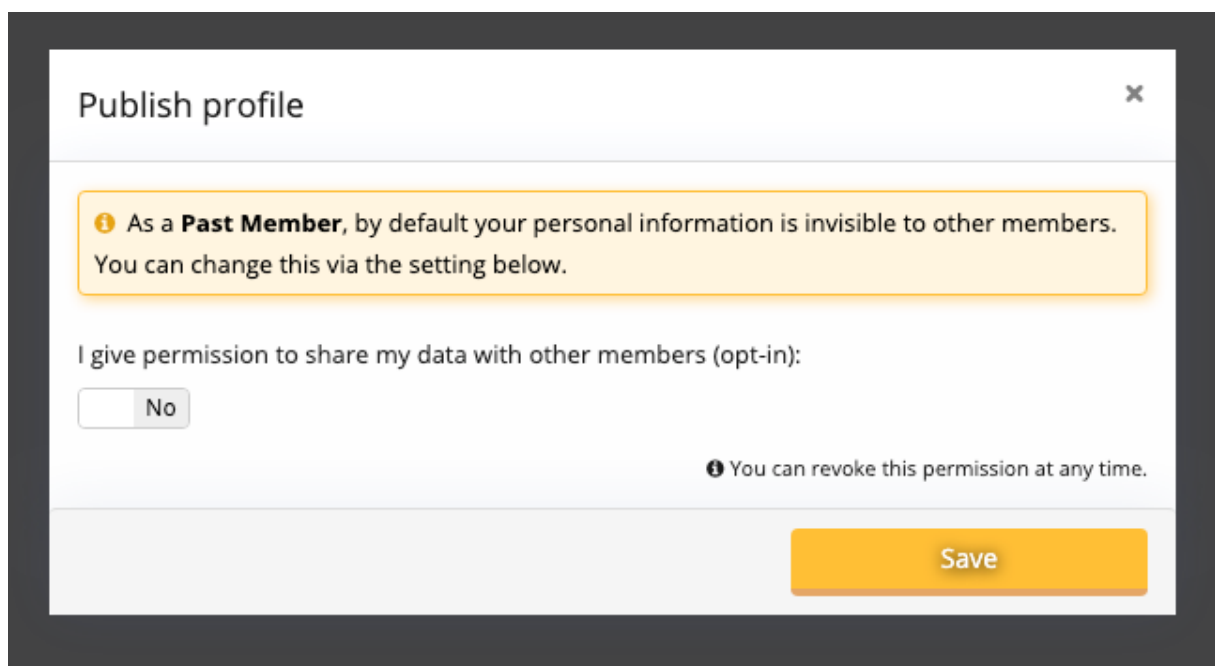
Education

Regular PastMember

PUBLISH PROFILE: NO ID

As a **Past Member** you can update your profile and privacy settings. Your profile will be automatically **archived** after 12 months of inactivity.

- They can archive their profile anytime via "My Settings"
- They can change their privacy settings (after opt-in also with other members)

- They cannot access any other content than their profile & settings
- Their information will be shown in the Club Directory, in the "Past Members" tab of their Club's profile.
- They won't receive emails from Area/Association/Int'l level, only from their own Club.

2) Activation of the Active Past Members module

- Associations will see a new "Active Past Members" menu item, with an application form. They can upload the necessary document.
- This request will be emailed to the email entered on LCI level (in Settings > Preferences).



GENERAL

Dashboard

DEFAULT MODULES

CRM

Communication

Activities

Reports

Documents

Photos

Polls

Finances

Signup Forms

Statistics

EXTRA

Individual registrations

★ Active Past Members

ADVANCED

Settings

Admin / Active Past Members

Active Past Members

The "Active Past Members" module allows past members to access all data, news, events... of CIRCLER.WORLD

To access this module, you need to submit a document (pdf or image) with proof that it is in line with the GDPR, for example an extract from the statutes. This document will be made available to all members.

Document with proof*

Choose file No file chosen

Save

GENERAL

Dashboard

DEFAULT MODULES

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Individual registrations

★ Active Past Members

ADVANCED

Settings

Admin / Active Past Members

Active Past Members

The "Active Past Members" module allows past members to access all data, news, events... of CIRCLER.WORLD

✓ Access to this module has been requested.

LCI admins are able to **login as Support** to the Association, and activate the module in "Settings > Preferences" (cf. Indiv. Registrations)



Settings

Default language new contacts

English (en)

Combination for guest accounts ⓘ

select a combination to assign

🔗 Contacts / Guest

Activate module "Individual registrations"?
(enable individual registrations and activate the module)


Yes ☐


Activate module "Active Past Members"?
(allows subscriptions for former members)


Yes ☐

3) Active Past Members

If the Active Past Members module is active, logged-in Past Members in this association will always be able to "upgrade" their account from their **profile** OR from re-visiting the "**choice**" page.



Regular
PastMember 

ACTIVE PAST MEMBER: **NO** 

Past Members that want to upgrade to "Active Past Member", will get a form with:

- invoice details (pre-filled)
- opt-in to publish their profile
- information entered by the association



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💡 Using the form below, you can request to upgrade your account to an **"Active Past Member"** subscription. The terms and conditions of this subscription are determined by your association.

INFORMATION

[Information on pricing, approval process...](#)

BILLING INFO

It is possible that there are costs associated with this subscription. Therefore, please check your billing details carefully.

Name	Active PastMember	
Address (1)	Address (1)	
Address (2)	Address (2)	
Country	----- ▾	
Postal code & town/city	Postal code	Town/city
VAT number	VAT number	

OPT-IN

By confirming this request, you agree that your profile can be consulted by other members. You can still decide which data you want to share.

I give permission to share my data with other members (opt-in):*

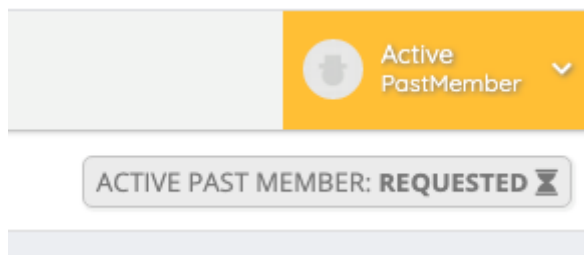
☐ No

✕ Cancel

📁 Confirm

On confirm, they will get a success message and the configured National Board members (see below) will receive an email:

✓ Your request was received successfully. You will be notified by email when your subscription is active.



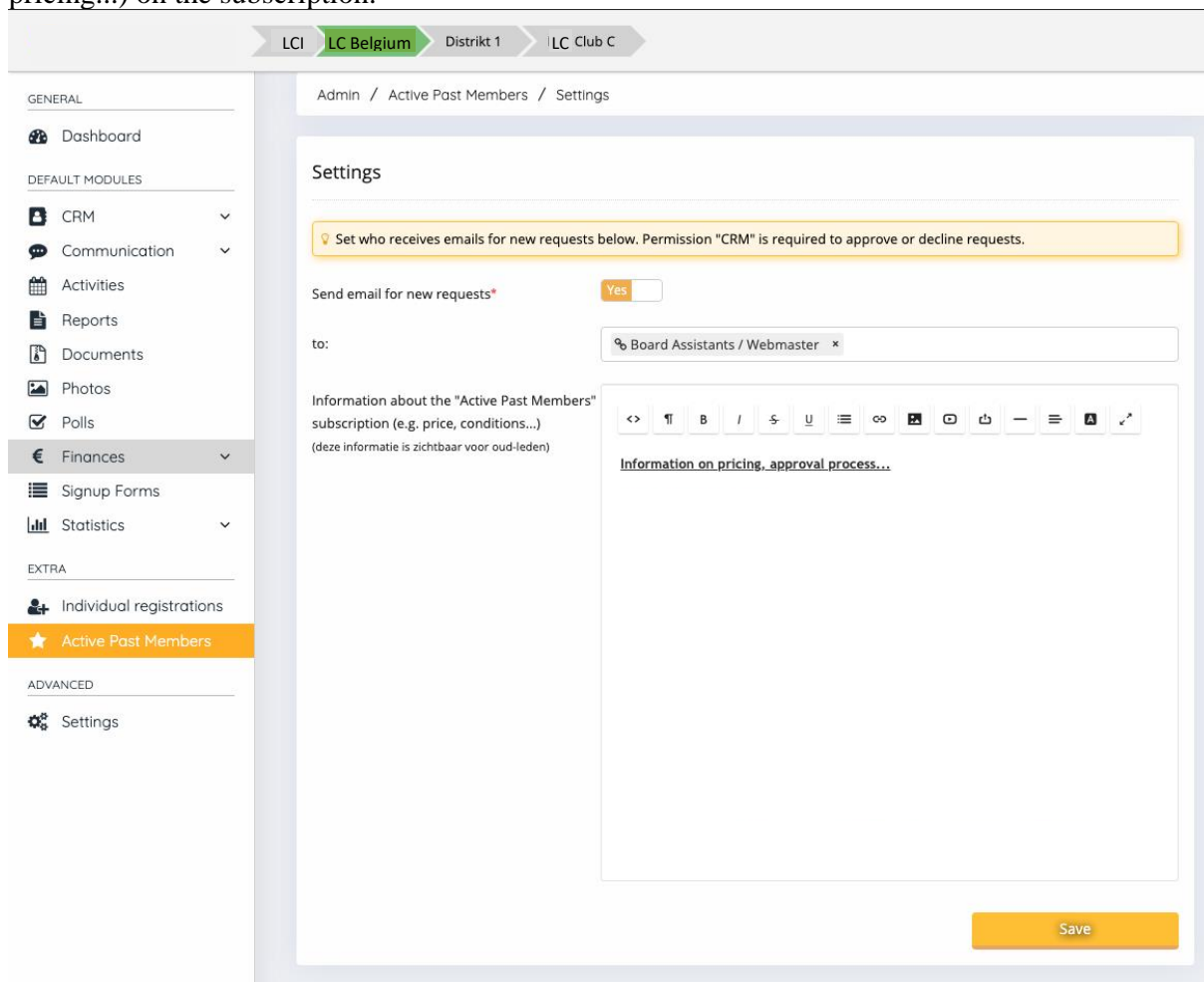
Once **approved**, an Active Past Member has access to all content, up to Association level

- Club Directory (up to own association -- no region / int'l / family)
- Members Directory (only (Past) Members from own association)
- Event Calendar (events in own association)
- Reports
- Polls / News / ... (own club, area, association)

Active Past Members can receive emails from all levels except international (LCI).

4) Administration of Active Past Members

Via Active Past Members > Settings, the National Board members (with CRM permissions) can configure who will receive the requests via email. They can also enter information (e.g. terms, pricing...) on the subscription.





Via Active Past Members > Requests, the National Board members (with CRM permissions) can approve (+email) / decline (+email) / filter / export requests. Subscriptions are proposed for 1 year by default.

This screenshot shows the 'Requests' page within the 'Active Past Members' section. At the top, there's a breadcrumb trail: 'Admin / Active Past Members / Requests'. A 'Back' button is in the top right. Below the breadcrumb, a search bar shows '25 results'. A table lists requests with columns: 'Contact', 'LC Club 3', 'Status', 'Registered on', and 'Actions'. One request is visible: 'Active PastMember' for 'RT3 Club C' with status 'OPEN' and registered on '12/07/2020 12:45'. The 'Actions' dropdown menu is open, showing 'Approve' and 'Decline' options. To the right, there's a 'FILTER' section with a 'Status' dropdown set to 'Open'. Below the table, it says '1 to 1 from 1 results'. On the far right, there are links for 'List of Active Past Members' and 'Settings'.The first screenshot shows the 'Approve request' modal. It has a title bar with a close button. A yellow warning box says: 'Enter the start date and (optionally) an end date of the subscription.' Below this, there are two date pickers. The 'Start date*' is set to '2020-07-12' and the 'End date:' is set to '2021-07-12'. At the bottom right is an orange 'Approve' button. The second screenshot shows the 'Decline request' modal. It also has a title bar with a close button. A yellow warning box says: 'Are you sure you want to decline this request? Optionally, enter a reason to inform the requester by e-mail.' Below this is a text area labeled 'Reason:' with the placeholder text 'Reason'. At the bottom right is an orange 'Decline' button.

Via Active Past Members > List of Active Past Members, the National Board members (with CRM permissions) can edit (e.g. extend) / cancel subscriptions.



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Admin / Active Past Members Back

25 results

Search ...

Contact	Club	Start date	End date	Actions
Active PastMember	RT3 Club C	12/07/2020	12/07/2021	Actions

1 to 1 from 1 results

FILTER

Status: Active

ACTIONS

requests (0)

Settings

Edit subscription
Delete subscription

5) Other

- There is a new default mailing list e.g. pastmember@1-xx.ladiescircle.world
- Active Members can adjust a filter to include Past Members in the search results of the Member Directory

Order by: First name

Sector: -----

Phone number: Phone number

Function: -----

Club Number: Club Number

[Work] Position: [Work] Position

Town/city: Town/city

Also search Past Members?

Yes